

Job Title:	Business Analyst	FLSA:	Non- Exempt
Division:	Insurance	Revision Date:	4/3/2018

Position Purpose:

The Business Analyst is responsible for coordinating and creating the process for payroll and carrier reports. This position oversees technical aspects of the organization data, reports and general administration of our customer relationship management, commission, communication, and documentation systems. The Business Analyst also enhances the overall marketing effort of Midwest Heritage Insurance Services.

Essential Functions:

Administration:

- Administer all agency customer relationship management systems and business systems.
- Recommend implementation of features and functions where appropriate.
- Understand agency systems and operational requirements as they relate to agency objectives and strategies.
- Procure and prepare carrier data for import to agency systems.
- Create and maintain documentation for agency business/system processes and store them in a central location.
- Provide system support and training to end-users throughout the agency.
- Organize and lead user acceptance testing (UAT) with the appropriate stakeholders.
- Generate sales and revenue reports that meet agency and channel requirements
- Reconcile commission payments to the agency and to agents.
- Call Center administration and process improvement recommendations.
- Provide password and login support for all agency systems and company network.
- Complete special projects as assigned.
- Under limited supervision; research and document business processes and meet with stakeholders to determine business requirements and create new business processes.

Customer Service:

- Provides best-in-class support to the MHIS staff, distribution team and sales agents.
- Presents a positive and helpful demeanor.

Other:

- Work with the Agency Operations Director to identify process improvement areas throughout the agency using automation
- Report to work when scheduled and on time.

Secondary Duties and Responsibilities:

Performs other job-related duties and special projects as required.

Knowledge, Skills, Abilities Required:

- Must have a friendly positive attitude and strong communication skills.
- Must show leadership and excellent customer service.
- Good analytical skills along with strong attention to detail and ability to meet deadlines.
- Knowledge of basic accounting functions.
- Must have proficiency of PC with Microsoft Word, Excel, Access, Outlook, and good typing skills.
- Must be comfortable working with our Customer Relationship Management System.
- Excellent organizational and follow-up skills.
- Must maintain a high degree of confidentiality.

Education, Experience, and Other Requirements:

- Must have at least five years' experience in insurance industry.
- Must have experience with analyzing data, accounting functions and working with spreadsheets, financial reports and other technical communication systems.

Reporting Relations:

Accountable and Reports to: Agency Operations Director

Supervisor Responsibilities: None

Working Conditions and Physical Requirements:

- The duties of this position are normally performed in a general office setting. This is a fast paced work environment.
- This position is classified sedentary/light and requires the ability to sit for long periods of time.
- There is frequent pressure to meet deadlines and handle multiple projects in a day.
- Visual requirements include: ability to see detail at near range with or without correction.
- Must be able to perform the following physical activities: sitting for long periods, talking (in person and by telephone), hearing and repetitive motions.

Travel:

Minimal

Equipment Used:

Computer (PC with Microsoft Office programs), telephone, calculator, telephone, copier, fax, printer and agency management software.

Other Position Requirements:

Contacts: This position works with Midwest Heritage employees, customers, Hy-Vee employees, vendors and outside agents doing direct business with Midwest Heritage.

Confidentiality: This position has the responsibility to protect the privacy and confidentiality of customers, employees and bank/insurance/financial information at all times.

In the performance of their respective tasks and duties all employees are expected to:

- Follow all state and federal regulatory requirements and complete assigned training courses within the required timeframes.

- Perform quality work within deadlines.
- Interact professionally with other employees, customers and suppliers.
- Work effectively as a team contributor on all assignments.
- Work independently while understanding the necessity for communicating and coordinating work efforts with other employees and organizations.

This job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee. Other duties, responsibilities and activities may change or be assigned at any time with or without notice.

Your signature indicates that you have reviewed this job description and understand all expectations. Please return a signed original to Human Resources for the employee file.

Employee Name (please print)

Signature of Employee

Date